

## 1. TolaData User Guide: Account Set-up

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## 1. Setting up your user account

1.1. The Org Admin for your organisation will send you an email invitation to join TolaData. More information for Org Admins on inviting new users to TolaData can be found in our knowledgebase:

<https://www.toladata.com/docs/quick-start-guide/invite-new-users-to-toladata/>

1.2. Click on the link in the email, set your password and you're ready to go. *Nb: TolaData is configured for the latest version of the Google Chrome and Microsoft Edge browser. Please ensure you are using one of these browsers when setting up your account.*

1.3. You can then log in to TolaData at [toladata.io](https://toladata.io) using your email and password.

1.4. If you forget your password there is a link on the login page to reset it.

## The Project

To access the features of TolaData, you must have access to a project. You can either create your project or join a team member's existing project.

## 2. Create a new project or ask to join an existing project

2.1. Create your first project on TolaData by selecting the 'Project' section on the navigation panel on the left hand side, then click 'Add new project'.<sup>1</sup>

2.2. Type in the name of your project, its start and end date and click 'Save'.

The screenshot shows the TolaData web application interface. On the left is a navigation sidebar with options like Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. The main area displays a 'Project' section for 'A1. Humanitarian Health Project'. A modal dialog titled 'Add new Project' is open in the center, with fields for 'Name\*' (containing 'Enter text'), 'Start date', and 'End date'. Below the dialog are 'Cancel' and 'Save' buttons. In the top right of the main interface, a '+ Add new Project' button is highlighted with a red box and labeled '1.'. The 'Save' button in the dialog is highlighted with a red box and labeled '2.'.

<sup>1</sup> Depending on your organisation's TolaData setup, this may be labelled differently, e.g. "project" and "Add new project".

2.3. If you want to join a project that someone else has created you can ask them or the Org Admin to add you to that project team. They can add you to the project and set your permissions in the teams tab of the project details page.

## 3. Give other users access to your project

3.1. To give other users access to a project you have created you add them as team members to that project. [Please note that users first must have been invited by the Org Admin to create their TolaData account]

3.2. Begin by selecting 'Project' in the left hand navigation panel. Next, click on the name of the project you have created. This will bring you to a page where you can see details of the project.

3.3. Click on the 'Team' tab, followed by 'Add existing team member.' Start adding users from the drop down menu.

The screenshot shows the TolaData interface for a project named 'A.3 My New Project'. The left sidebar contains navigation options: Project, Details (highlighted with a red box and number 1), Activity, Indicators, Forms, Data tables, and Dashboards. The top navigation bar includes tabs for Details, Sites, Phases, Stakeholders, Documents, Reporting periods, and Disaggregation types. The 'Team' tab (highlighted with a red box and number 2) is selected, showing a table of team members (19). The table has columns for MEMBER NAME, ROLE, and STATUS. A red box and number 3 highlight the '+ Add existing team member' button. Below the button, two team members are listed: Aoife Ann Doran (Project Admin) and Aine Farrelly (Org Admin).

3.4. The members you add to a specific project will have access to all the data of that project but you can set their permissions by changing their role. There are four types of project roles:

- **Project Admin:** manages the team and permissions for the project, set up of project structure, full edit rights to the project data which includes additional rights for editing and deleting certain data. It is possible to have more than one Project Admin.
- **Edit User:** has full edit rights to the project data with some restrictions on what they can edit or delete.

# TolaData

- **Data Entry:** has view only access to all project data but can't edit or add data, except can input new results, import data tables, request approvals and add document links.
- **View Only:** has view only access to all project data but can't edit or add data.

3.5. More information on adding project team members is available in our knowledge base: <https://www.toladata.com/docs/quick-start-guide/add-team-members-to-your-pr>

The screenshot shows the TolaData interface for a project named 'A.3 My New Project'. The left sidebar contains navigation options: Project, Details (highlighted with a red box and labeled '1'), Activity, Indicators, Forms, Data tables, and Dashboards. The main content area has a top bar with a project name and a filter icon. Below this is a toolbar with icons for Details, Sites, Phases, Stakeholders, Documents, Reporting periods, and Disaggregation types. A second toolbar contains icons for Team (highlighted with a red box and labeled '2'), IATI, and Sharing. The main content area displays a table titled 'Team members (19)'. The table has columns for MEMBER NAME, ROLE, and STATUS. A red box labeled '3' highlights a '+ Add existing team member' button in the table. The table lists two members: Aoife Ann Doran (Project Admin) and Aine Farrelly (Org Admin).



## Exercise A.

- Create your own project
- Add a team member to your project and set their permissions.

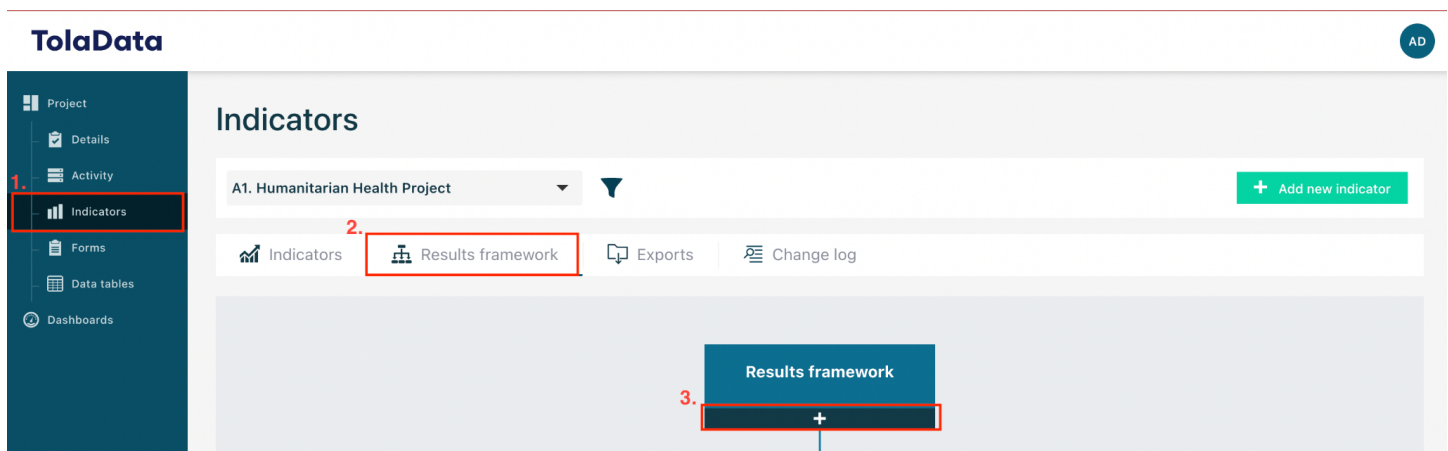
## The Indicator Section

The Indicator section in TolaData helps you to assess whether your interventions and approaches are on the right track to achieve your intended outcomes and outputs. In your indicator workflow, you can track your progress against the overall and periodic targets, with easy tools to report both your total and disaggregated results.

### 4. Build a results framework

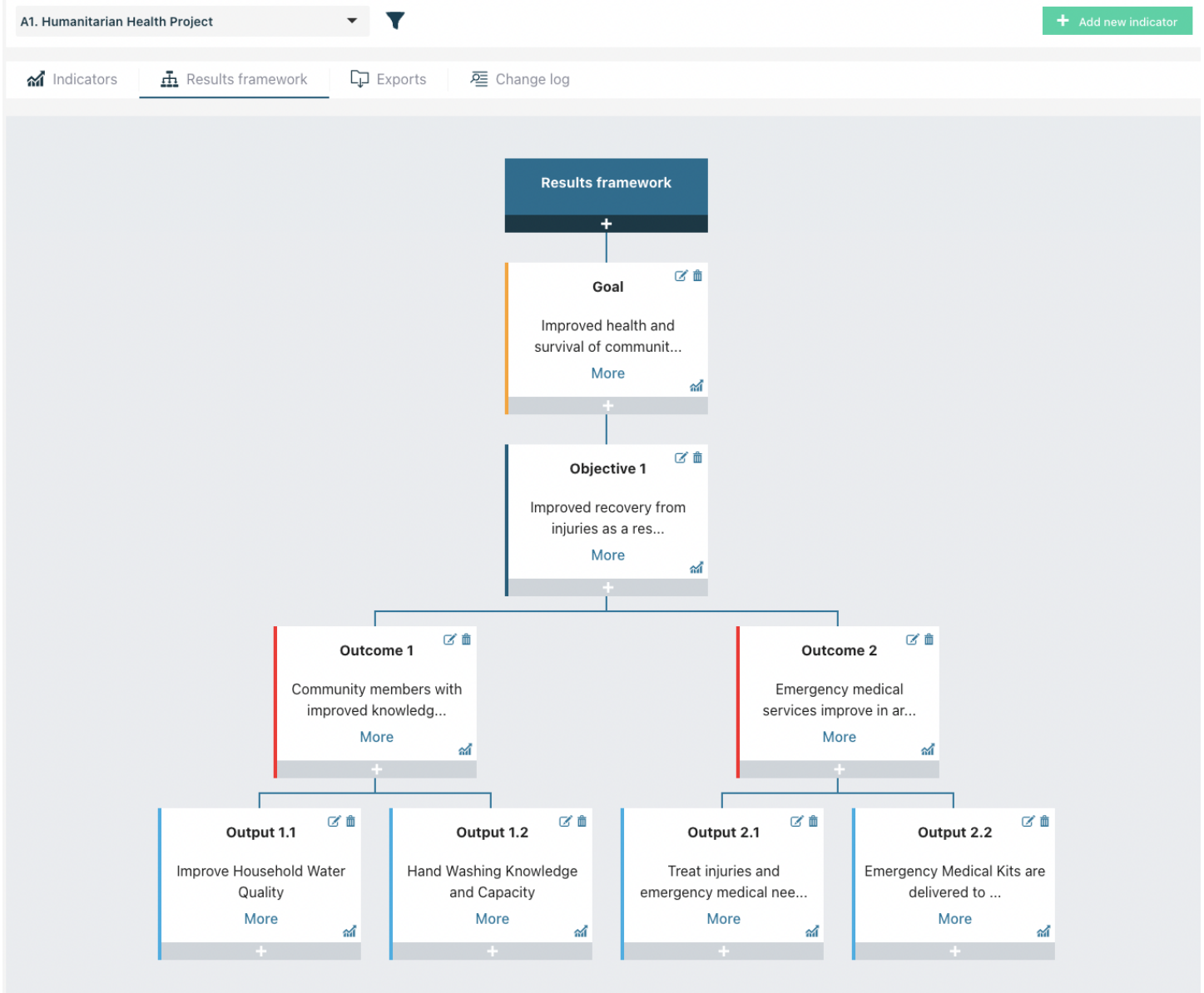
Use the results framework feature to visualise the logic model of your project and organise your indicators.

- 4.1. Select 'Indicators' on the navigation panel and use the drop down menu at the top left of the page to select the project you want to add indicators to, then click on the 'Results framework' tab.



- 4.2. Click on the '+' to start building your framework levels with your project objectives, outcomes, outputs etc.
- 4.3. You can add as many results framework levels as you like to build out your results framework tree as seen below.

## Indicators



## 5. Add an indicator plan

- 5.1. Select 'Indicators' on the navigation panel and use the drop down menu at the top left of the page to select the project you want to add indicators to.
- 5.2. Click 'Add new indicator.'

- 5.3. Fill in the indicator name and select the indicator format. Indicators can be numeric, percentage or qualitative.

The screenshot shows the TolaData interface for the 'A1. Humanitarian Health Project'. On the left sidebar, the 'Indicators' menu item is highlighted with a red box and labeled '1.'. In the top right corner, a green '+ Add new indicator' button is highlighted with a red box and labeled '2.'. The main content area shows a list of indicators under 'Objective 1'. A modal dialog titled 'Add new indicator' is open in the center. It contains a text input for 'Indicator name\*' (labeled '3.') and a dropdown menu for 'Indicator format\*'. The dropdown menu is open, showing three options: 'Numeric' (highlighted in light green), 'Percentage', and 'Qualitative only'. Below the dialog, a table of indicators is visible, including '9.50 / 10.00 rate of incidence' and '61.50% / 85.00%'.

- 5.4. Finish adding your indicator details and select save.

This screenshot shows the 'Add new indicator' dialog box with more details filled in. The 'Indicator name\*' field now contains the text 'My Indicator'. The 'Indicator format\*' dropdown is set to 'Numeric'. A new dropdown for 'Desired direction of progress' is visible, set to 'Increasing'. The 'Life of program (LOP) target' field contains the number '100'. There is a 'Baseline (BL)' field which is currently empty. An 'Aggregated indicator' checkbox is checked with 'Yes'. At the bottom of the dialog, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

- 5.5. You can drag and drop your indicators within the list to organise them under the results framework headings.

- 5.6. Click on the name of an indicator to open it and add more details





## Exercise B.

- In the project you have created, add three results framework levels - a goal, an outcome and an output level. Try to add a description to each level and a corresponding colour.
- Navigate back to the indicator tab and create three indicators - one numeric indicator, one percentage indicator and one qualitative indicator.
- Try organising the indicators in the indicator tab by dragging and dropping them under your result framework levels.

## Adding Periodic Targets & Disaggregations to your Indicator

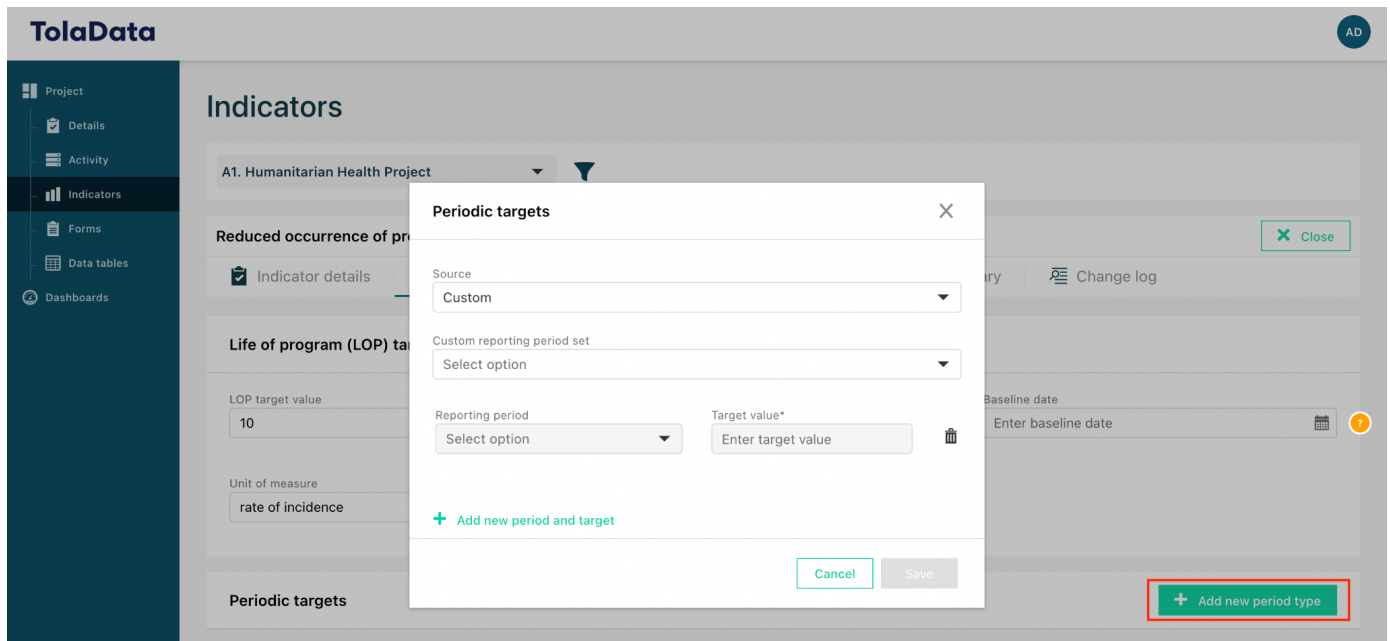
Link reporting periods and disaggregations to your indicator to further analyse your data.

- 5.7. Add periodic targets:** click on the 'Targets and disaggregations' tab and then click 'Add new periodic type'.

- 5.8.** There are two sources of periods you can choose from:

- 5.8.1. Standard: monthly, quarterly, semi-annual or annual periodic targets according to the standard calendar (eg. Quarter 1 = 1 January - 31 March)

- 5.8.2. Custom: these are customised periods created by the admins for the project. For example, they might be the donor's annual reporting period (eg. USAID annual = 1 October - 30 September)
- 5.8.3. More information on managing reporting periods is available here: <https://www.toladata.com/docs/knowledge-base/indicator-workflow/add-reporting-periods/>



**5.9. Link disaggregation types:** click on the 'Targets and disaggregations' tab. At the bottom of the form you will see the disaggregation types already linked and available to the indicator. To link another disaggregation type, click "Add disaggregation types" and select the disaggregation type you want to make available to the indicator.

- 5.9.1. Custom disaggregation types are created at the details level of the project.
- 5.9.2. Disaggregations can have [default ranges](#) attached to them.
- 5.9.3. More information on creating and managing disaggregations is available here: <https://www.toladata.com/docs/knowledge-base/how-to-manage-disaggregations/>



## Exercise C.

- Select the numeric indicator you have created, navigate to the targets and disaggregations tab.
  - Add a reporting period by selecting 'Add new period type'. As the source, select 'Standard' and in the 'Type of periodic target' dropdown select 'Annual'.
  - Add a reporting period target for two years
  - Select 'Save'
  - Next, add a disaggregation type. Select 'Link disaggregation types' and select the standard disaggregation type 'Country'.

## Adding Data to your Indicator

Data can easily be added to your indicator depending on your data collection method! Data can be added manually, from a TolaData form or from any machine readable source.

## 6. Manual Entry

- 6.1. Go to the 'Indicator' section. Here, you will see your list of indicators and every indicator will have a 'Collected data' icon on the right hand side (next to the delete icon.)
- 6.2. Click on the 'Collected data' icon to open the data results list for that indicator.

**Indicators**

A1. Humanitarian Health Project

+ Add new indicator

Indicators | Results framework | Exports | Change log

NAME	FORMAT	COLLECTION FREQUENCY	STATUS	ACTUAL VS TARGET
<b>Goal</b>				
Reduced occurrence of preventable diseases among affected communities	Numeric	Semi-annually	On track	9.50 / 10.00 rate of incidence 95.00% Last updated: 2023-01-26
<b>Objective 1</b>				
% of injured community members who make full recovery	Percentage	Semi-annually	On track	61.50% / 85.00% 72.38% Last updated: 2021-11-25
Comprehensive beneficiary feedback system in place	Qualitative only	Quarterly	Partially achieved	Last updated: 2021-12-13
<b>Outcome 1</b>				
# of members attending community health workshops	Numeric	Monthly	On track	8,948.00 / 12,000.00 members 74.57% Last updated: 2023-02-06

- 6.3. Click 'Add new collected data'.

**Indicators**

A1. Humanitarian Health Project

Close

Indicator details | Targets & disaggregations | Collected data | Results summary | Change log

Status: On track

Total actuals formula\*: Last collection date

Actual vs Target: 9.50 / 10.00 rate of incidence  
95.00%

+ Add new collected data

**Collected data**

COLLECTED VALUE	DATE COLLECTED	EVIDENCE	IDENTIFIER	ADDED BY	DATE ADDED
9.5	Jan 17, 2023	-	Aine	Aine Farrelly	Jan 16, 2023

- 6.4. Two options for entering data will appear, manual entry or pull from data table. Select manual entry.
- 6.5. Enter the collected value and the date collected. You can also add an identifier and link the collected data to a site. For more information on manual entry select here: <https://www.toladata.com/docs/knowledge-base/indicator-workflow/add-collected-data-to-your-indicators/>

The screenshot shows the TolaData interface for an indicator. The left sidebar contains navigation options: Project, Details, Activity, Indicators (selected), Forms, Data tables, and Dashboards. The main content area is titled 'Indicators' and shows the project 'A1. Humanitarian Health Project'. The indicator is 'Reduced occurrence of preventable diseases among affected communities'. The 'Collected data' tab is active, showing a status of 'On track' and a progress bar for 'Actual vs Target' at 95.00% (9.50 / 10.00 rate of incidence). Below this, there are two buttons: 'Manual entry' (highlighted with a red box) and 'Pull from data table'. The 'Manual entry' form has four fields: 'Collected value\*' (with '2' entered and highlighted by a red box), 'Date collected\*' (with '01.02.2023' and a calendar icon), 'Identifier' (with 'Enter identifier'), and 'Site' (with 'Select sites'). Below the form are sections for 'Evidence' (with a 'Google Drive' icon and '+ Add URL/location as evidence' button) and 'Notes' (with a rich text editor toolbar and 'Enter text' placeholder). At the bottom, there is a '+ Add disaggregation data' button and a note: 'To manage the available disaggregations or add a new disaggregation type, go to the 'Targets & disaggregations' section.' At the very bottom, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a red box.

- 6.6. Once you have added all relevant information select save.



## Exercise D.

- In your numeric indicator, add a piece of data manually

## 7. Pull from Data Table

To add data from a machine readable source, we must first import the dataset into TolaData. You can import data into the system from other sources such as KoBo Toolbox, ONA, Google Sheets, Excel, One Drive or CSV files.

**7.1.** Click on 'Data tables' in the navigation panel.

**7.2.** Select the project from the drop down menu that you want to add data to, then click on 'Import table' and select the source of your collected data.

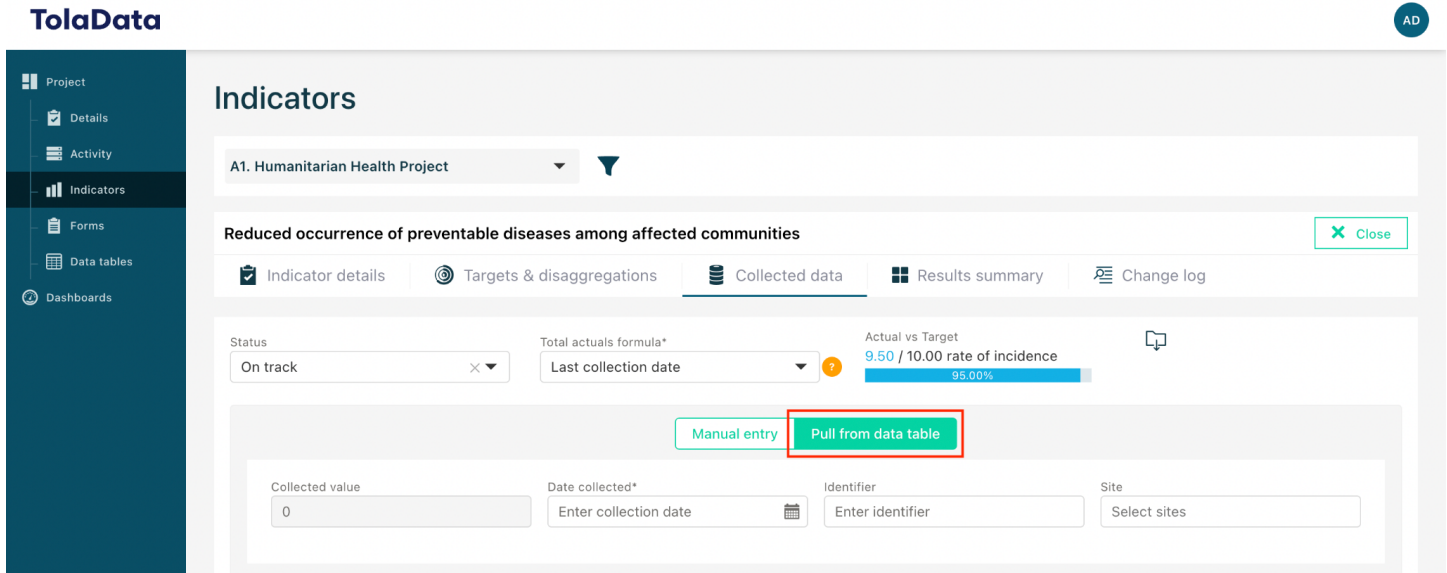
The screenshot shows the TolaData interface. On the left, a navigation sidebar includes 'Data tables' which is highlighted with a red box and labeled '1.'. The main area is titled 'Data tables' and shows a project selection dropdown set to 'A1. Humanitarian Health Project'. Below this is a table with columns: TABLE NAME, SOURCE TYPE, SOURCE LINK, ADDED BY, and DATE. The table lists several 'Workshop survey' entries. To the right of the table, a red box labeled '2.' highlights the '+ Import table' button and a dropdown menu with the following options: KoBoToolbox, Google Sheet, OneDrive(Excel), CSV, Excel, and ONA.

**7.3.** More information on importing data can be found in our knowledge base: <https://www.toladata.com/docs/knowledge-base/data-collection-and-management/import-data-external-sources/>

## Add collected data result to an indicator

**7.4.** Go to the indicator you would like to add data too.

**7.5.** Click 'Add new collected data' and select the 'pull from data table option'. This option allows you to pull data directly from a data set you have imported into the data tables section to calculate the results automatically. You can apply different mathematical operations and also conditions to filter your results.



- 7.6. More Information on adding collected data can be found in our knowledge base: <https://www.toladata.com/docs/knowledge-base/indicator-workflow/add-collected-data-to-your-indicators/>



## Exercise E.

- In your numeric indicator, add a piece of data from a Data Table
- Begin by importing a dataset into TolaData in the Data Tables section
- Once imported, link the data to your numeric indicator

## See a summary of the results for your indicator

- 7.7. See a summary of the results for your indicator: Click on the 'Results summary' tab to see your indicator results analysed over time, against your periodic targets and by the disaggregation types used in your collected data.

The screenshot displays the TolaData interface for an indicator titled "Reduced occurrence of preventable diseases among affected communities". The left sidebar shows navigation options: Project, Details, Activity, Indicators (selected), Forms, Data tables, and Dashboards. The main content area includes a dropdown for "A1. Humanitarian Health Project", a "Close" button, and tabs for "Indicator details", "Targets & disaggregations", "Collected data", "Results summary" (highlighted with a red box), and "Change log". Below the tabs, there are fields for "Total actuals formula" (set to "Last collection date") and "Actual vs Target" (9.50 / 10.00 rate of incidence, 95.00%). A second set of tabs includes "Time-based results" (highlighted with a red box), "Periodic targets", and "Disaggregation results". Below these are dropdowns for "Source of period type" (Custom) and "Select period type" (Humanitarian Health Project Reporting). The main visualization is a bar chart titled "Humanitarian Health Project Reporting results" showing actuals for three phases: Phase 1 (approx. 0.15), Phase 2 (approx. 0.05), and Phase 3 (approx. 0.45).

Phase	Actuals
Phase 1	0.15
Phase 2	0.05
Phase 3	0.45

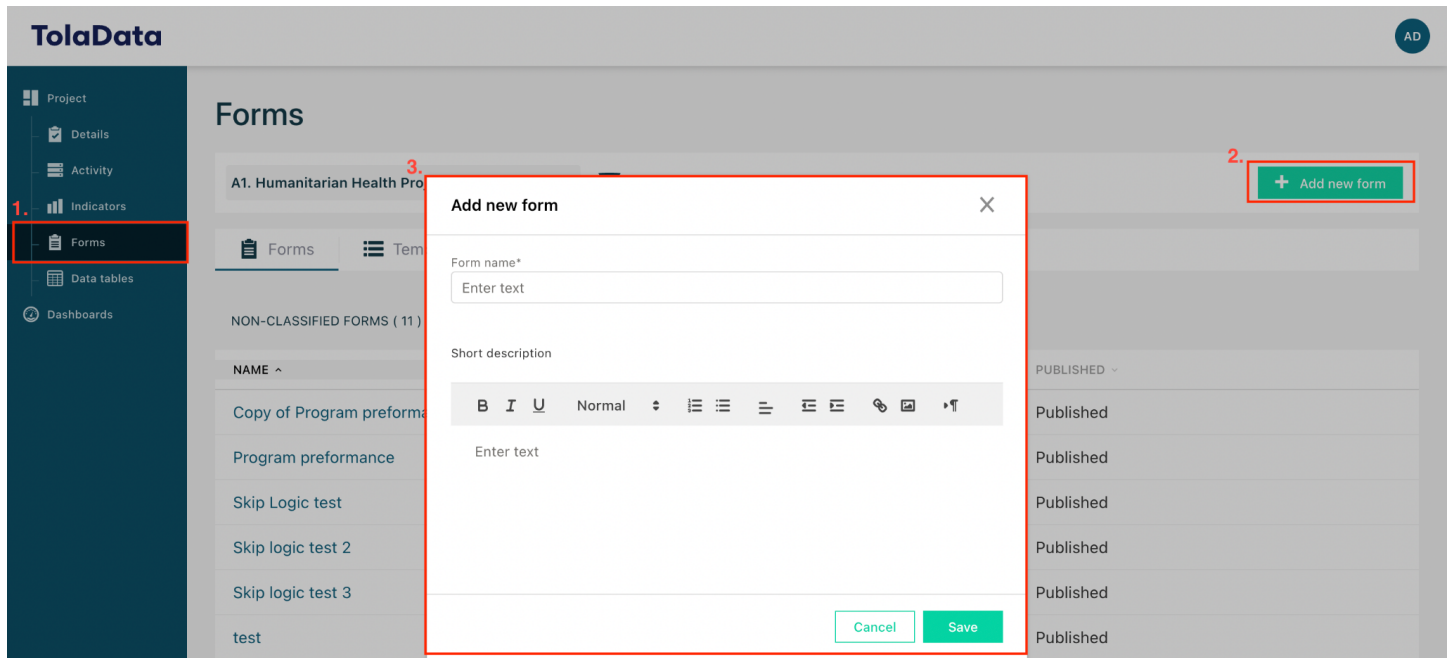
## 8. Create a data collection form

You can create your own forms to share with other staff, partners and data gatherers.

**8.1.** Click on 'Forms' on the navigation panel, select the project you want to create a form for from the drop down menu on the top left hand side, and then click 'Add new form'.

**8.2.** Enter the name of your form and then click 'save'.





- 8.3. Click the form name to open it. It is currently a draft so you can edit it and add questions. You can save the form, come back and edit it as many times as you like until you publish it.
- 8.4. Once a form is ready to start being used you can publish it and share it with data gatherers. Data gatherers do not have to be users of TolaData, they just need the unique web form link to submit data.
- 8.5. Once a form is published you cannot make any further changes to it. However you can stop further submissions if you wish to end the data collection.
- 8.6. When you publish a form a new data table is automatically created. Click on 'Data tables' on the navigation panel and select the project you want to view the data tables for. Click on the data table name to open it. Every time a data gatherer submits data using a webform another row of data is added to the data table.

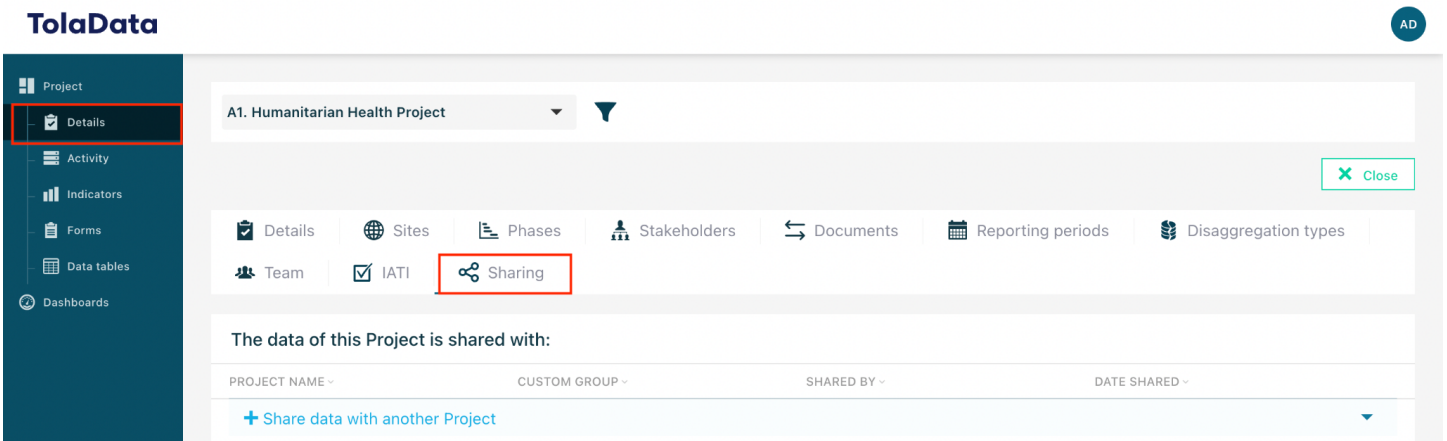
Trainee Feedback Survey	TolaData form	Trainee Feedback Sur	Jo Bennett	Jan 11, 2021	⋮
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- 8.7. More information on collecting data using Forms is available in our knowledge base: <https://www.toladata.com/docs/knowledge-base/data-collection-and-management/toladata-form-builder/>

## 9. Create aggregated indicators

To create aggregated indicators, contributing indicators are linked to the aggregated indicator and the result calculated based on a predefined formula.

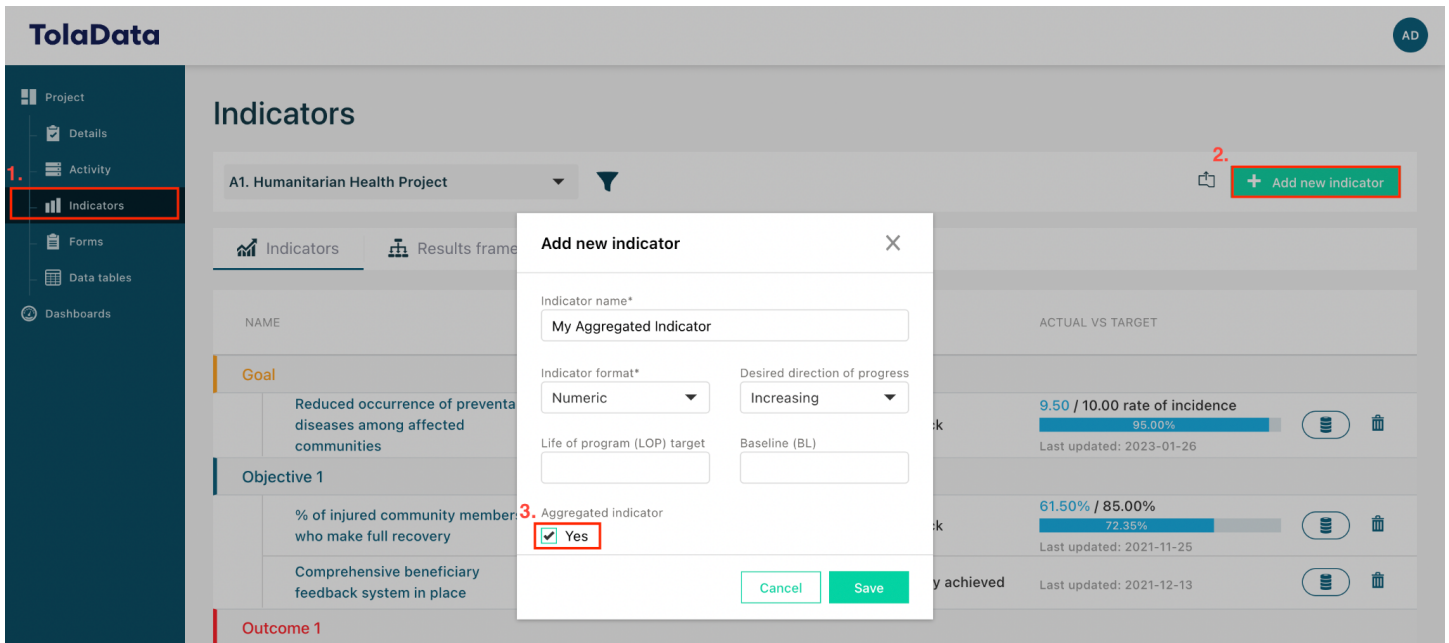
- 9.1. You can aggregate within and across projects. In order to aggregate across projects, you will first need to ensure that you are receiving data from the project from which you want to select contributing indicators. This happens in the 'Sharing' tab in the project details page.



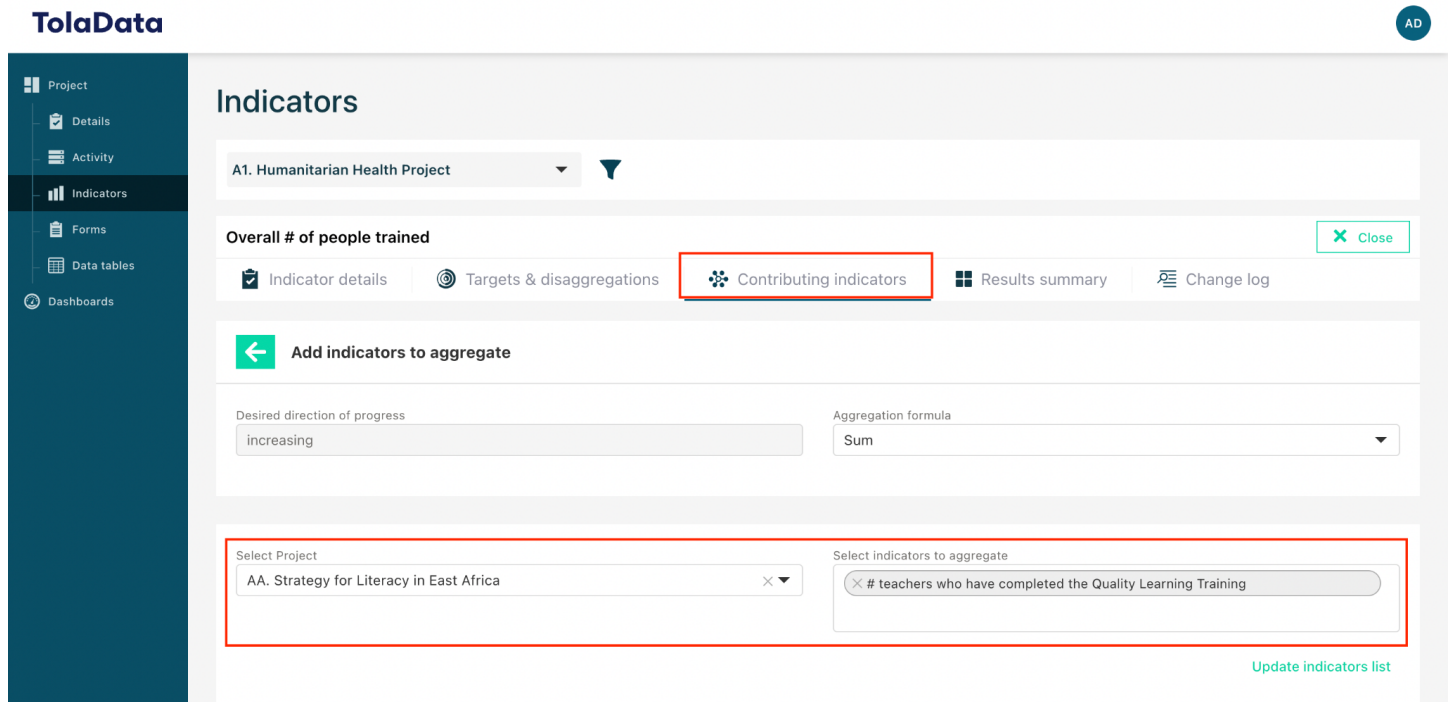
The screenshot shows the TolaData interface. On the left is a dark blue sidebar with a menu containing 'Project', 'Details', 'Activity', 'Indicators', 'Forms', 'Data tables', and 'Dashboards'. The 'Details' item is highlighted with a red box. The main content area is titled 'A1. Humanitarian Health Project' and features a 'Close' button in the top right. Below the title is a horizontal navigation bar with tabs for 'Details', 'Sites', 'Phases', 'Stakeholders', 'Documents', 'Reporting periods', and 'Disaggregation types'. The 'Sharing' tab is selected and highlighted with a red box. Below the tabs, the text reads 'The data of this Project is shared with:' followed by a table with columns for 'PROJECT NAME', 'CUSTOM GROUP', 'SHARED BY', and 'DATE SHARED'. At the bottom of the table is a '+ Share data with another Project' link.

- 9.2. To learn more about sharing data between projects see the tutorial video: [https://www.youtube.com/watch?v=fYEJxaK4zhw&t=1s&ab\\_channel=TolaData](https://www.youtube.com/watch?v=fYEJxaK4zhw&t=1s&ab_channel=TolaData)

- 9.3. To create an aggregated indicator, navigate to the indicator page and select the green '+Add new indicator' icon and check the box labelled 3. below for an aggregated indicator.



9.4. In the contributing indicators section, select the project you would like to take the contributing indicators from and then select the indicators themselves. You can add as many contributing indicators with the same indicator format and calculation formula as you like.



- 9.5. You can weight and adjust aggregated indicators as well as specifying the calculation formula to apply to the aggregated indicator. For more information on weighting and adjusting, see the knowledge base article: <https://www.toladata.com/docs/knowledge-base/aggregating-indicators-from-different-projects/aggregated-indicators-weighting-and-adjusting/>
- 9.6. Once you have selected all contributing indicators select save. The actual value will automatically aggregate as well as the disaggregation types and reporting periods applied to the contributing indicators.
- 9.7. In the indicator workflow the aggregated indicator can be identified by the 'aggregate icon', located next to the delete button.

**TolaData** AD

Project

- Details
- Activity
- Indicators
- Forms
- Data tables
- Dashboards

## Indicators

A1. Humanitarian Health Project + Add new indicator

Indicators | Results framework | Exports | Change log

NAME	FORMAT	COLLECTION FREQUENCY	STATUS	ACTUAL VS TARGET
<b>Goal</b>				
Reduced occurrence of preventable diseases among affected communities	KPI Numeric	Semi-annually	On track	9.50 / 10.00 rate of incidence 95.00% Last updated: 2023-01-26
<b>Objective 1</b>				
% of injured community members who make full recovery	KPI Percentage	Semi-annually	On track	61.50% / 85.00% 72.35% Last updated: 2021-11-25
Comprehensive beneficiary feedback system in place	KPI Qualitative only	Quarterly	Partially achieved	Last updated: 2021-12-13
<b>Outcome 1</b>				
Overall # of people trained	KPI Numeric			6,407.00 / 10,000.00 64.07% <span style="border: 1px solid red; padding: 2px;">⊕</span>

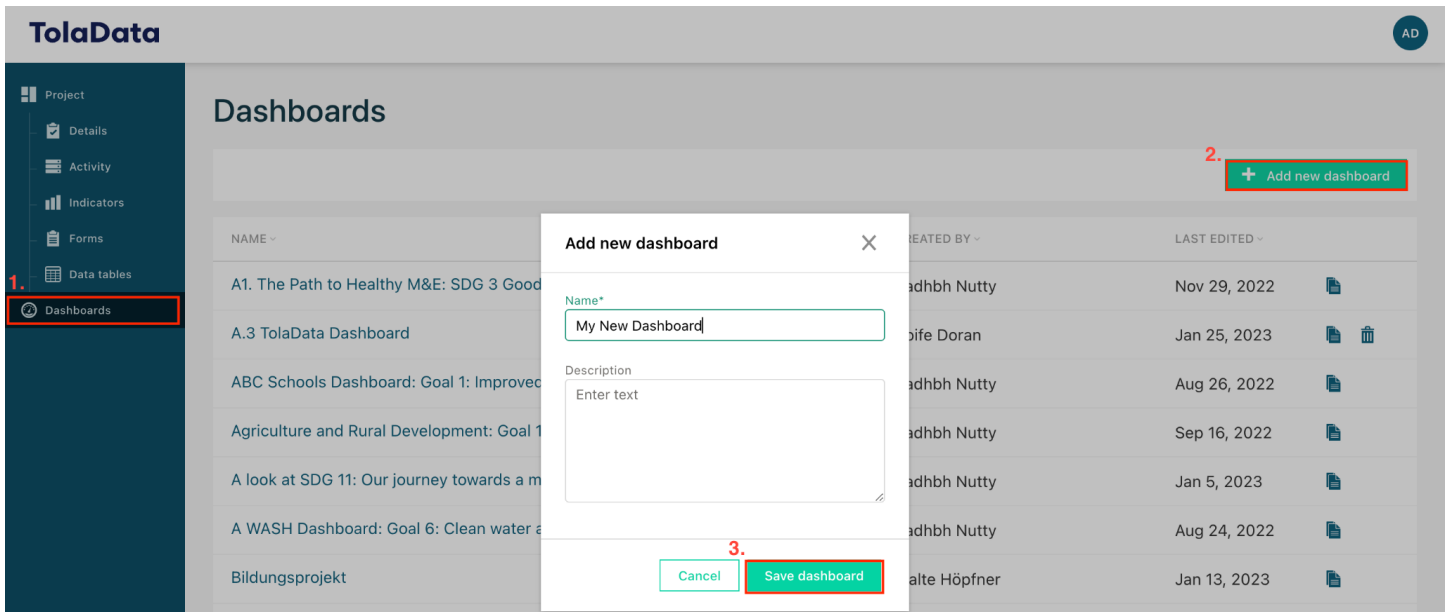


## Exercise F.

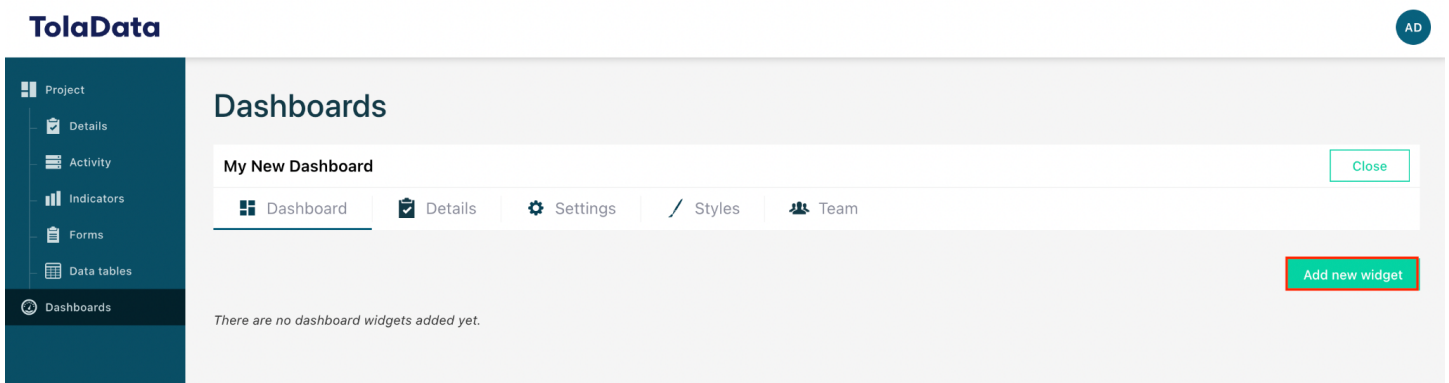
- Create an aggregated indicator
- Add three contributing indicators - these can be from within a project or from a project you have shared

## 10. Visualise your results by creating dashboards

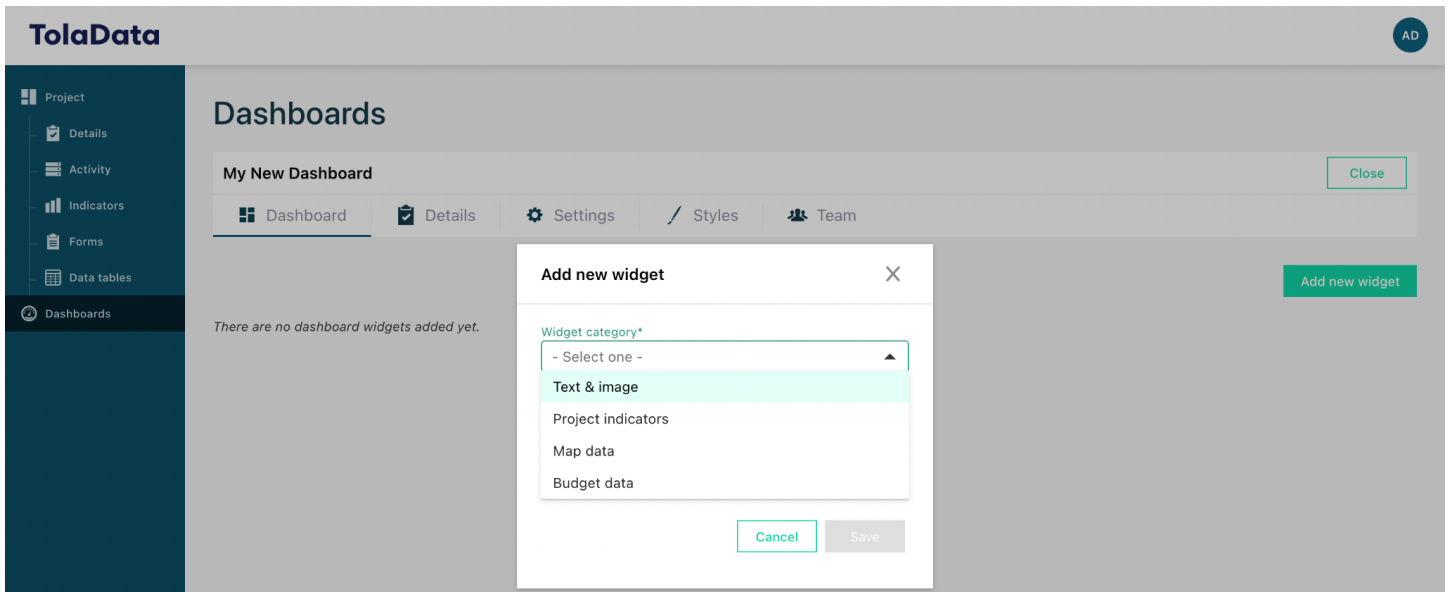
10.1. Select 'Dashboards' in the navigation panel and then click 'Add new dashboard'.



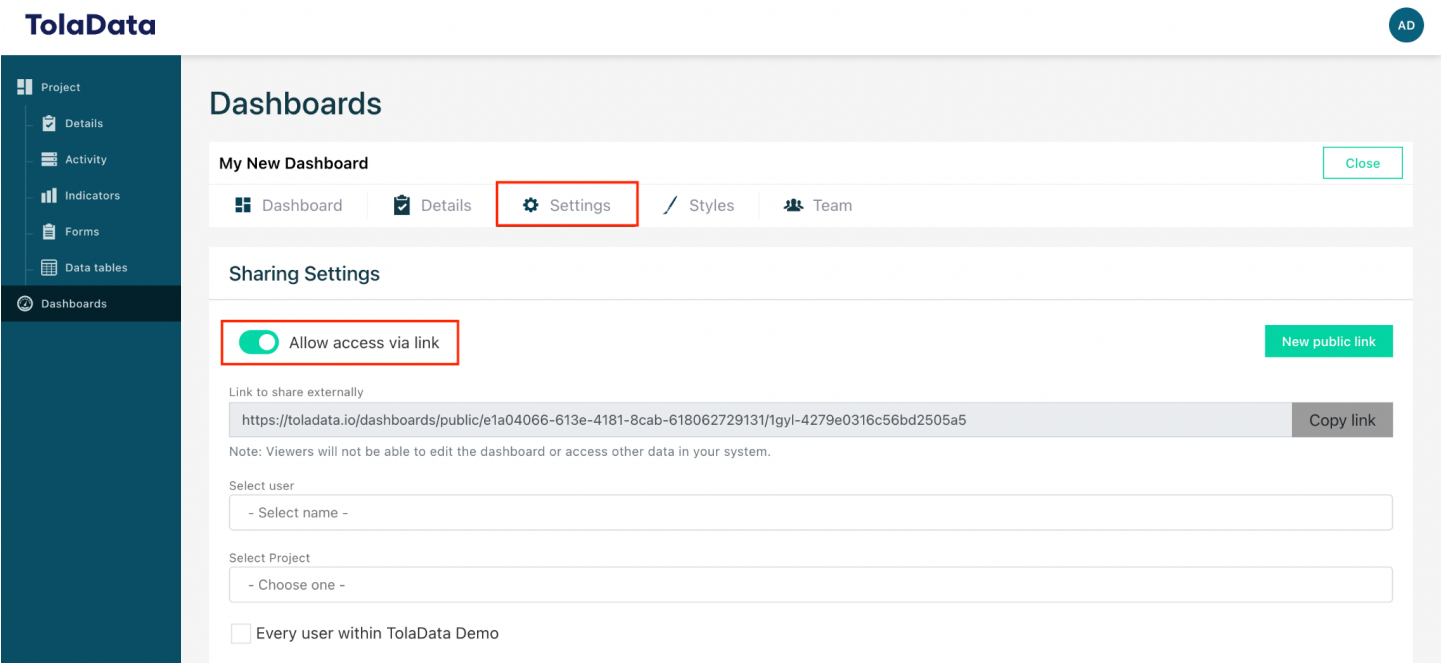
10.2. After entering a name and clicking save you will automatically come to your empty dashboard. You can add data to it by clicking 'Add new widget'.



10.3. You can choose between different types of widgets, including text/image widgets and various types for project indicator, map and budget visualisation.



- 10.4.** Share your dashboard by clicking on the 'Settings' tab. Within this tab you will see a toggle that, when activated, will generate an unguessable URL. To share with external users, click 'Copy link'. You can now paste the link into your email or send it through other means to share your dashboard with users who do not have access to TolaData.



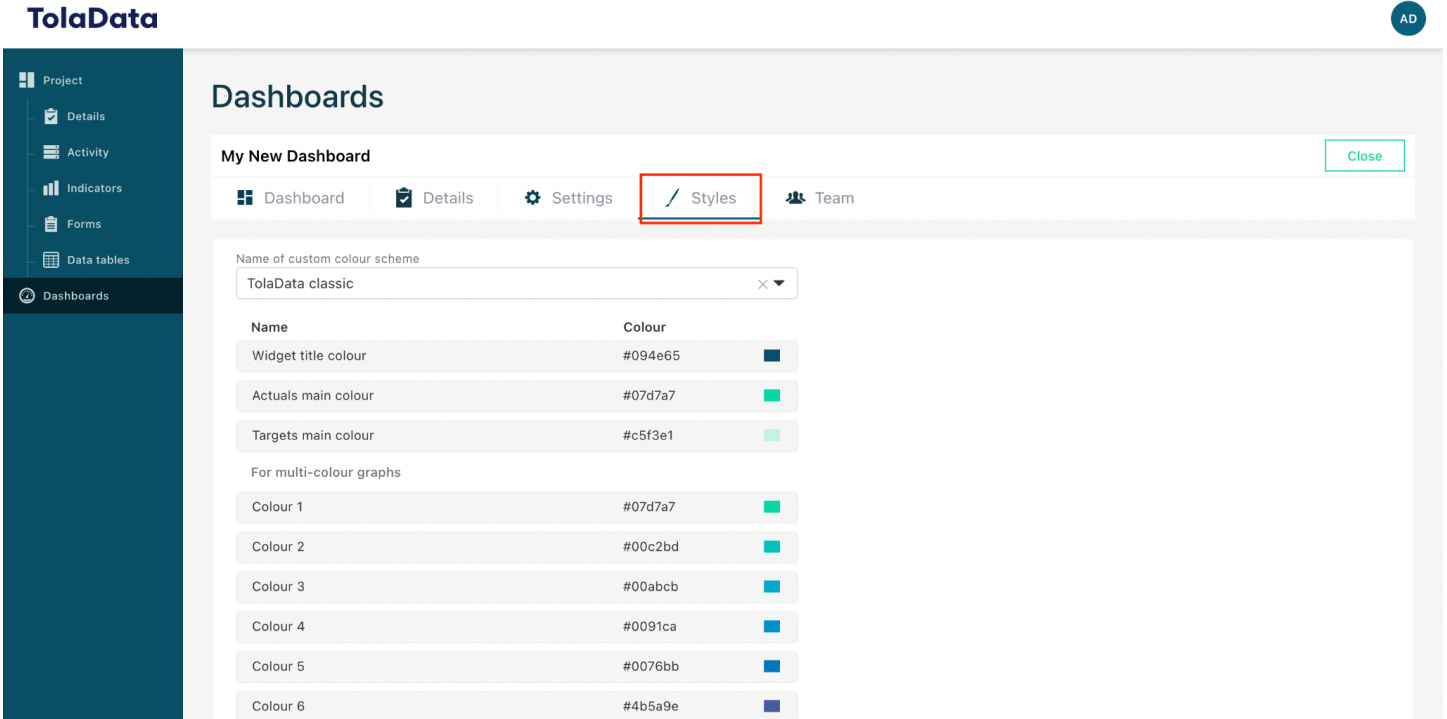
- 10.5.** Additionally, you also have an option to share the dashboard with individual members of your organisation unit or with entire project teams.

The screenshot shows the 'Dashboards' settings page for 'My New Dashboard'. The 'Sharing Settings' section is active, with a toggle for 'Allow access via link' turned on. A public link is displayed: `https://toladata.io/dashboards/public/e1a04066-613e-4181-8cab-618062729131/1gyl-4279e0316c56bd2505a5`. Below the link, a note states: 'Note: Viewers will not be able to edit the dashboard or access other data in your system.' A red box highlights the 'Select user' and 'Select Project' dropdown menus. The 'Select Project' dropdown is open, showing three options: 'A1. Humanitarian Health Project', 'A1. Projet de santé humanitaire', and 'A.1 SP Proyecto Humanitario de Salud'.

- 10.6.** To allow other team members to edit and add information to your dashboard, you can invite them to the dashboard and set their permissions in the 'Team' tab.

The screenshot shows the 'Dashboards' settings page for 'My New Dashboard', with the 'Team' tab selected. The 'Team members (1)' section is visible, showing a table with columns for 'MEMBER NAME' and 'ROLE'. One team member is listed: 'Aoife Ann Doran' with the role 'Dashboard Admin'. A '+ Add existing team member' button is also visible.

- 10.7.** You can change the colour of your dashboard widgets by selecting a different style package in the 'Styles' tab. Note that the style packages are created by the Org Admin in the Admin Console.



The screenshot shows the TolaData Admin Console interface. On the left is a dark blue sidebar with navigation options: Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. The main content area is titled 'Dashboards' and shows a configuration for 'My New Dashboard'. At the top of this configuration are tabs for Dashboard, Details, Settings, Styles (highlighted with a red box), and Team. Below the tabs is a dropdown menu for 'Name of custom colour scheme' set to 'TolaData classic'. A table lists various color settings with their names, hex codes, and color swatches.

Name	Colour
Widget title colour	#094e65
Actuals main colour	#07d7a7
Targets main colour	#c5f3e1
For multi-colour graphs	
Colour 1	#07d7a7
Colour 2	#00c2bd
Colour 3	#00abcb
Colour 4	#0091ca
Colour 5	#0076bb
Colour 6	#4b5a9e

- 10.8.** More information on dashboards is available in our knowledge base:  
<https://www.toladata.com/docs/knowledge-base/dashboards/>



## Exercise G.

- Check out this TolaData dashboard:  
<https://toladata.io/dashboards/public/02527e34-29fd-4a5a-a308-d3cde9ffb98d/1aox-2216752dd3be61d86c3b>
- Read through the widget configuration guide:  
<https://www.toladata.com/docs/knowledge-base/dashboards/configurable-widgets/>



## 11. Where to get more help

- 11.1.** You can find step by step guides to help with all the features in TolaData by clicking on the 'Guides' button in the bottom left hand corner.



- 11.2.** Speak with one of our User Support representatives using the live webchat available in the bottom right hand corner.



- 11.3.** Find all our user guides, best practice guides and latest product release notes in our knowledge base on our website: <https://www.toladata.com/docs/>
- 11.4.** Access a range of tutorial videos on our [TolaData YouTube channel](#)
- 11.5.** Contact us at [info@toladata.com](mailto:info@toladata.com)

